

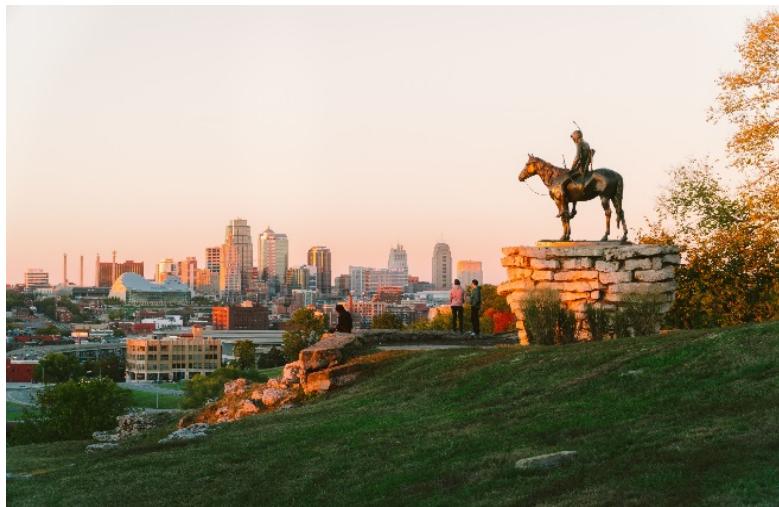


MISSOURI DIVISION OF TOURISM

JULY MISSOURI TRAVEL BAROMETER
(DATA AVAILABLE AS OF 8/11/20)



Missouri Travel Barometer



The Missouri Division of Tourism research team analyzes a range of tourism research metrics in order to provide the Missouri travel industry and the MDT staff with a monthly *Missouri Travel Barometer*.

The barometer shows key travel indicators that illustrate various measurements affecting Missouri's tourism industry and are indicators of its health.

Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



STR Lodging Trends – Week Ended August 1, 2020

OCCUPANCY
was down
39.4%
as compared to
the same week in
2019

STATEWIDE DEMAND
DECREASED
39.5%

ADR
(Average Daily Room Rate)
DECREASED
21.3%

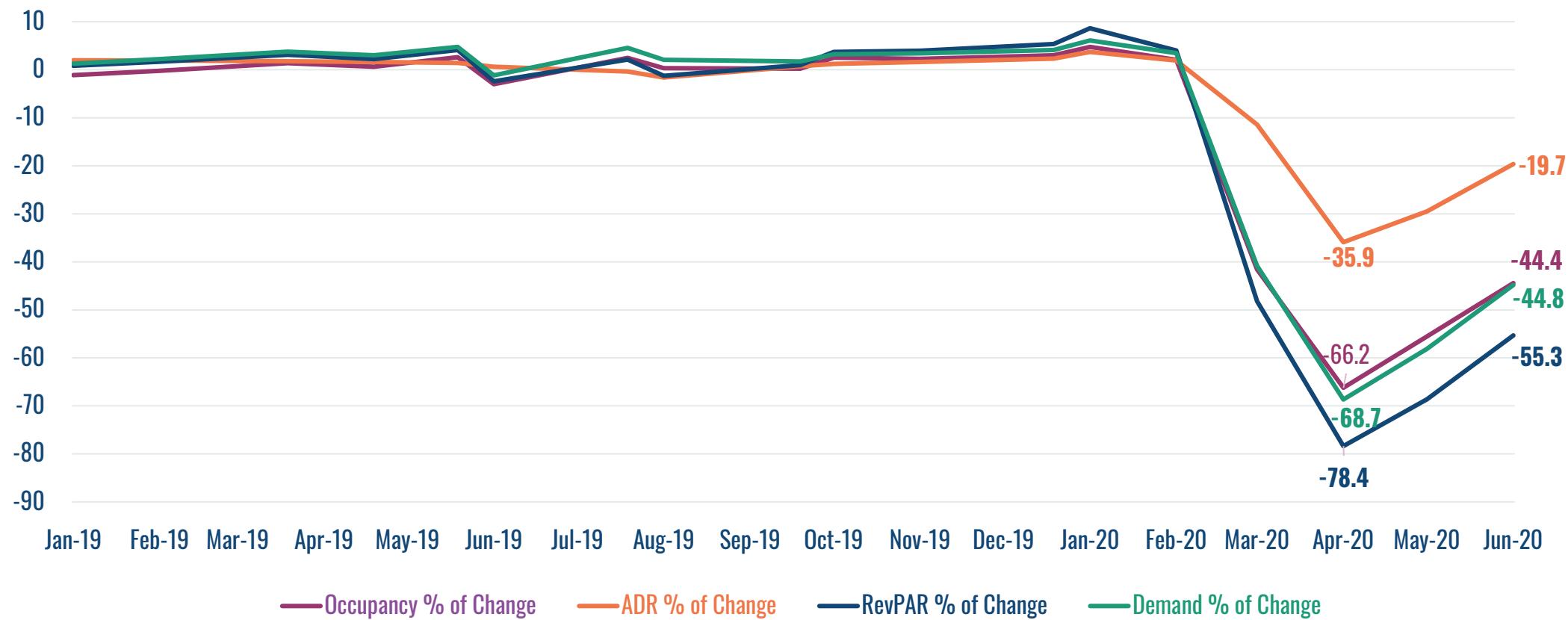
RevPAR
(Revenue per Available Room)
DECREASED
52.3%

Missouri Travel Barometer



The effect of Covid-19 first hit the week ending 2/29

STR Monthly Lodging Trends Percentage of Change

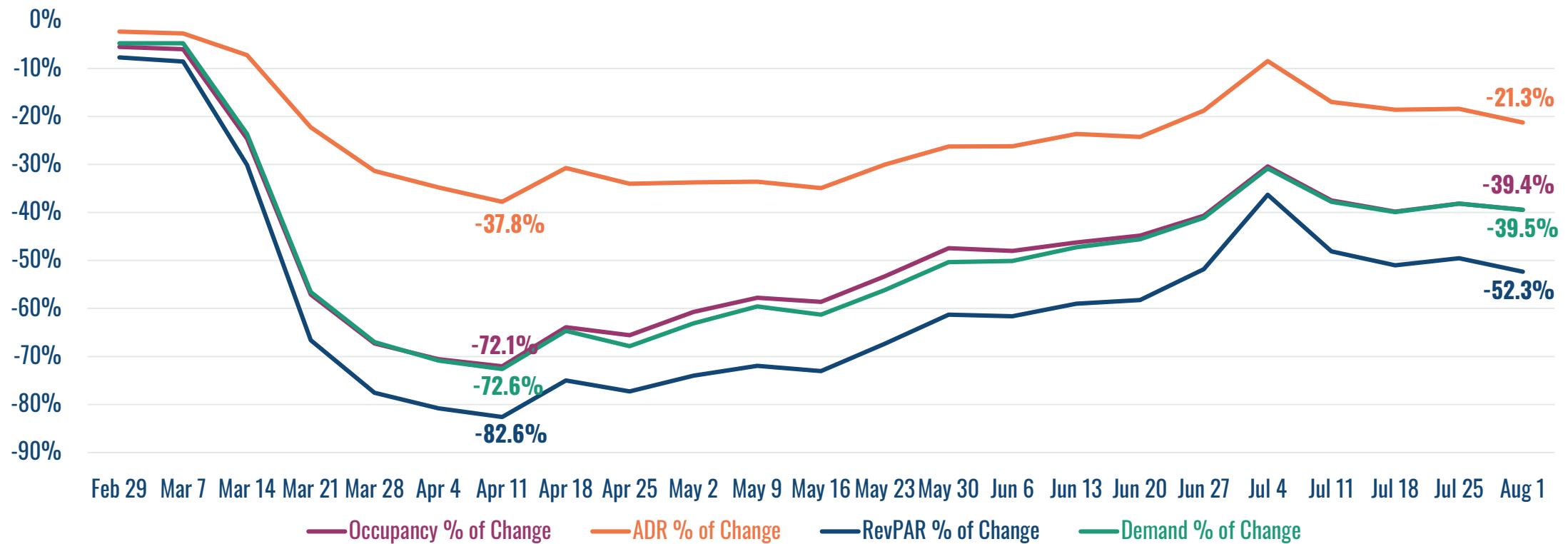


Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



STR Weekly Lodging Trends Percentage of Change

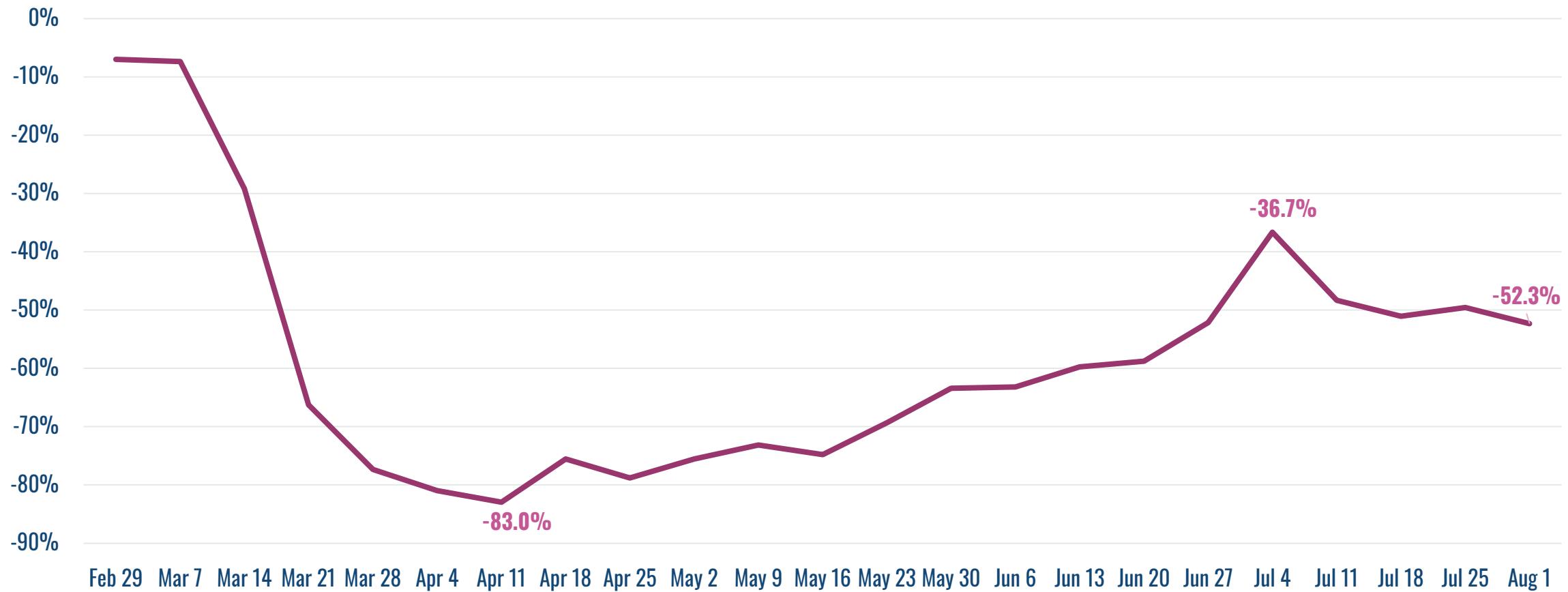


Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



STR Weekly Missouri Lodging Revenue % of Change from Prior Year



Missouri Travel Barometer



The effect of Covid-19 first hit the week ending 2/29

AirDNA Short-Term Rental Trends for Hotel Comparable Rooms

January – June 2020 Compared to 2019

OCCUPANCY
was down
-2.1%
as compared to
the time period in
2019

STATEWIDE
DEMAND
INCREASED
21.8%

ADR
(Average Daily Room Rate)
INCREASED
5.6%

RevPAR
(Revenue per Available Room)
INCREASED
3.4%

Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



AirDNA Short-Term Rental Trends for Entire Place Rentals

January – June 2020 Compared to 2019

OCCUPANCY
was down
-2.5%
as compared to
the time period in
2019

STATEWIDE
DEMAND
INCREASED
16.6%

ADR
(Average Daily Room Rate)
INCREASED
2.5%

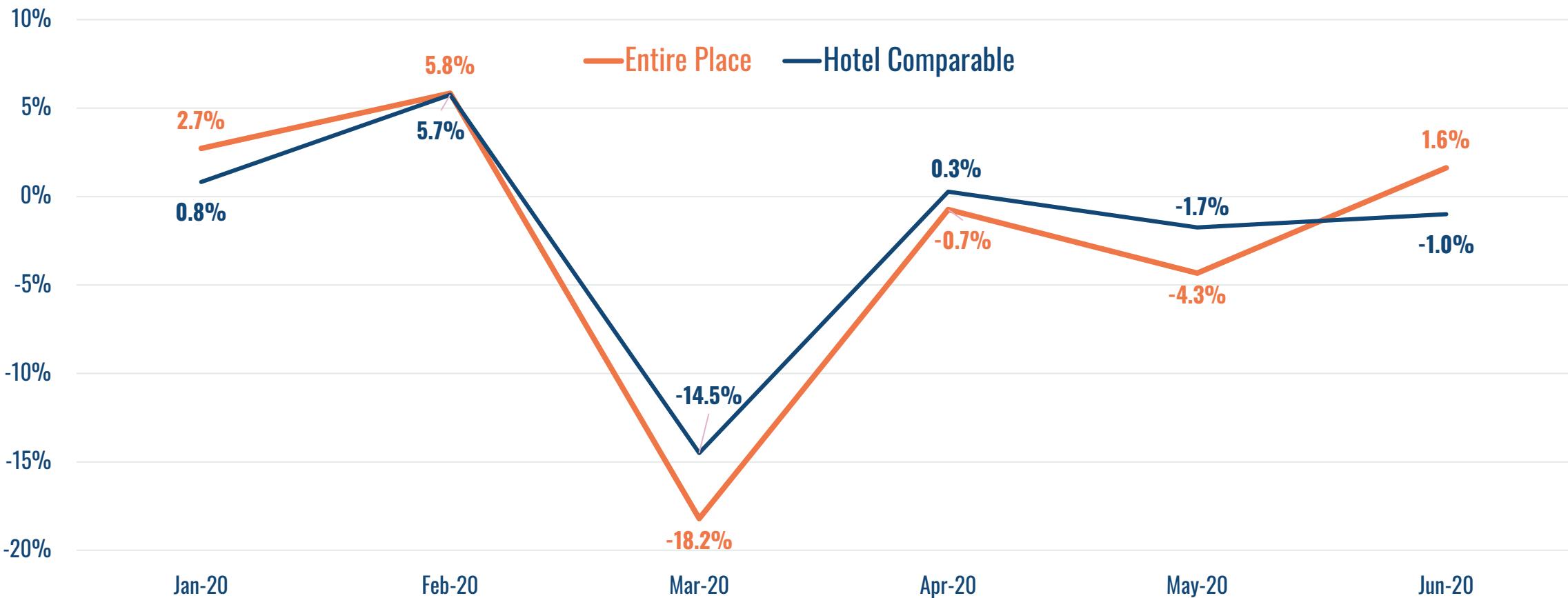
RevPAR
(Revenue per Available Room)
INCREASED
0.2%

Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



AirDNA Short-Term Rentals Occupancy% of Change from Prior Year



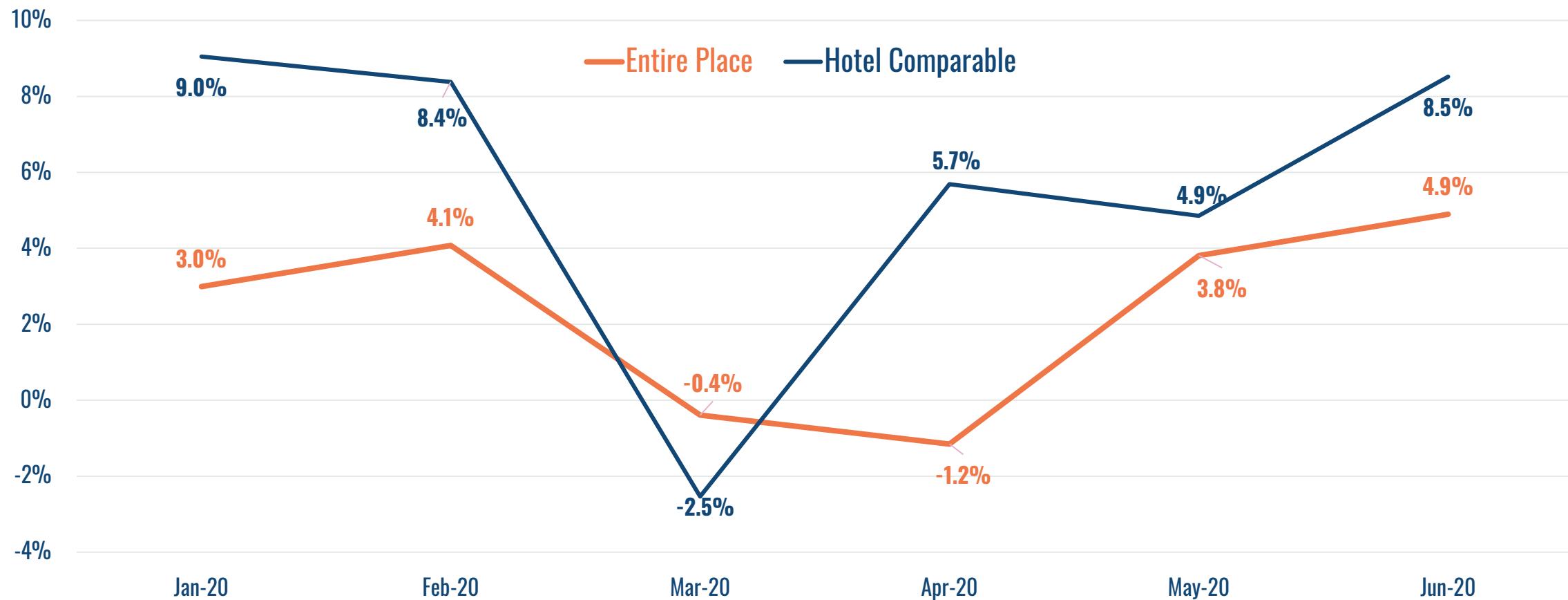
AirDNA listings include short-term rental properties listed by Airbnb and HomeAway.

Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



AirDNA Short-Term Rentals ADR % of Change from Prior Year



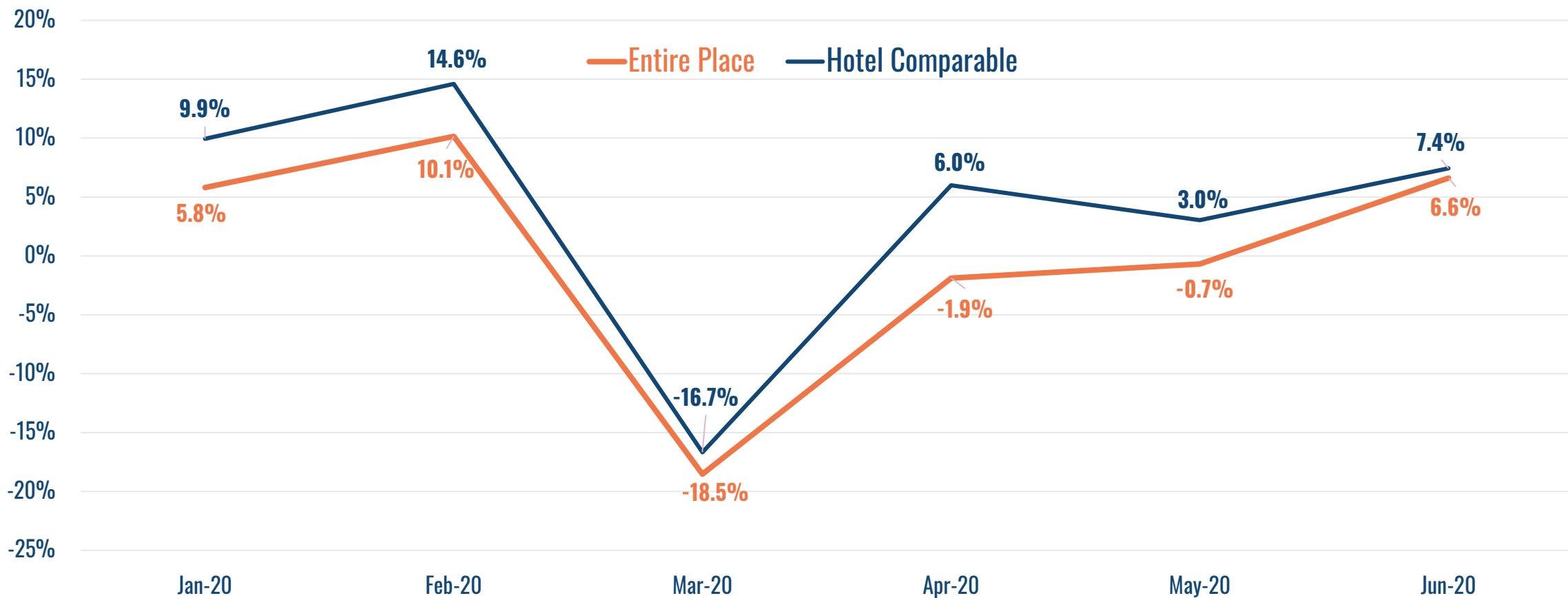
AirDNA listings include short-term rental properties listed by Airbnb and HomeAway.

Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



AirDNA Short-Term Rentals RevPAR % of Change from Prior Year



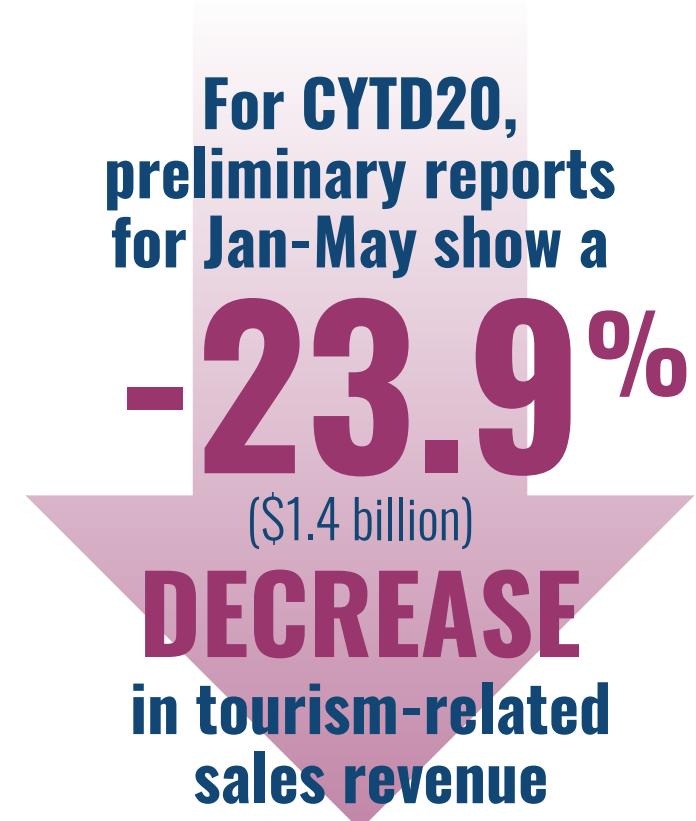
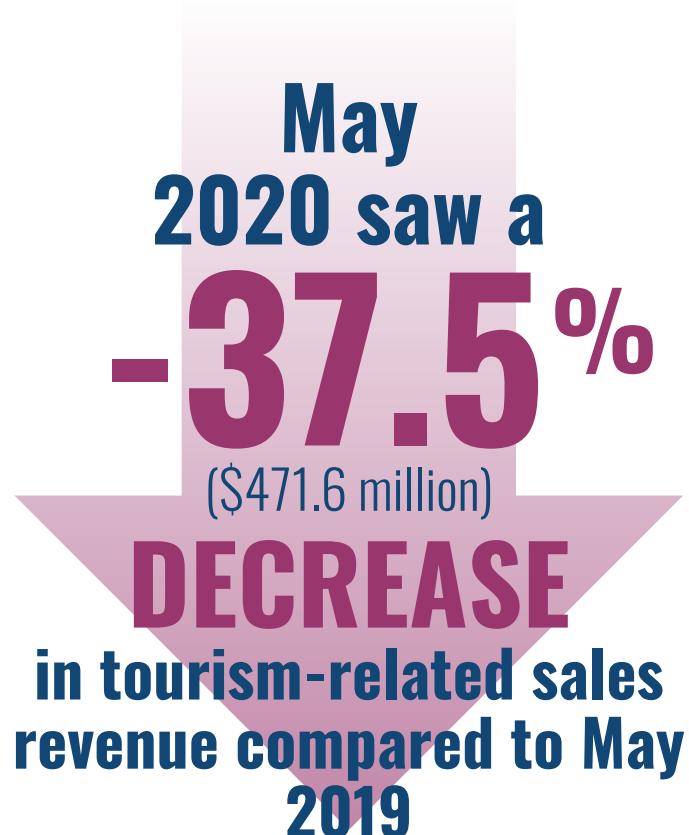
AirDNA listings include short-term rental properties listed by Airbnb and HomeAway.

Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year.



NAICS Tourism Business Sales through May 2020

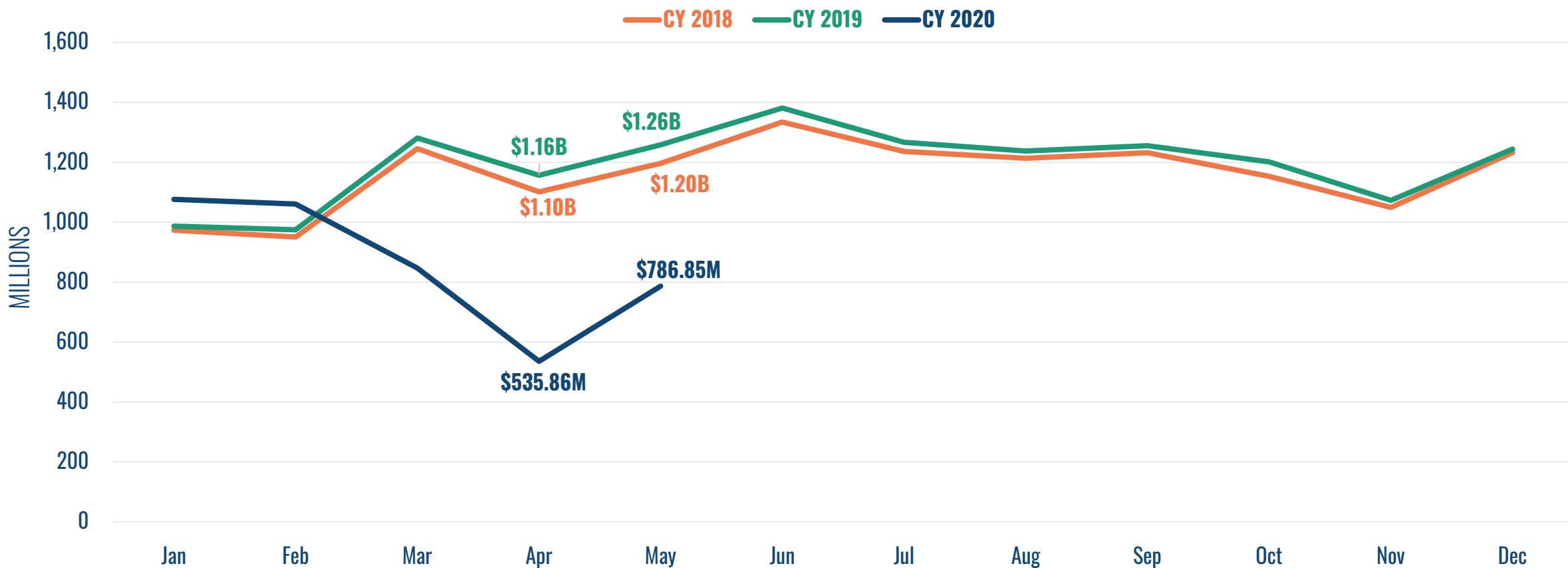


Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year.



CY Sales Revenue from Tourism-Related NAICS



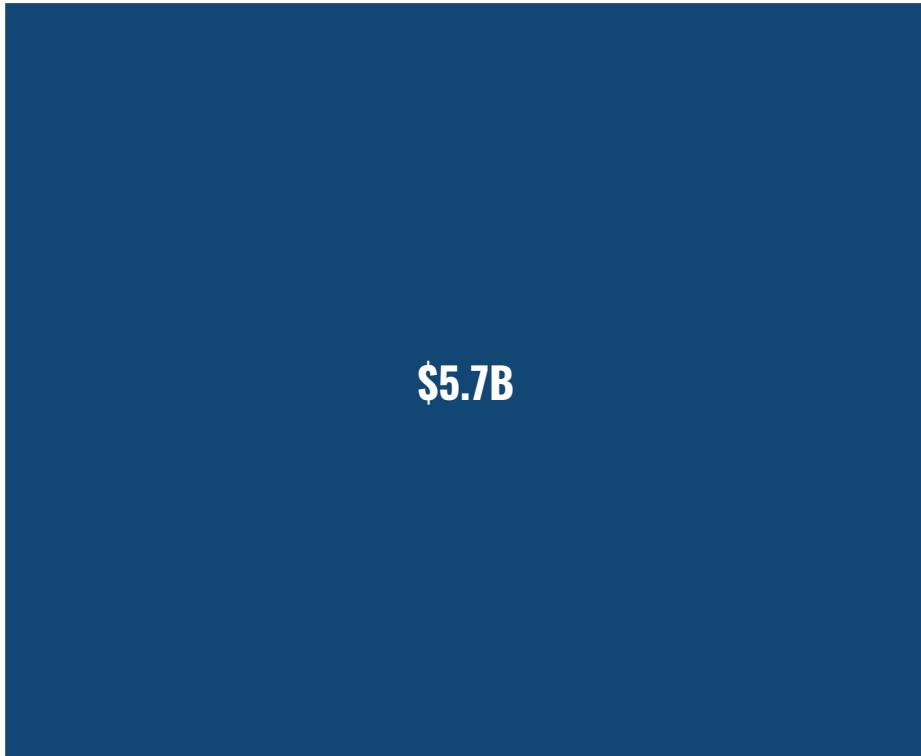
Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year.



CYTD January - May Sales Revenue from Tourism-Related NAICS

BILLIONS



CYTD 2019

**\$1.4 Billion Loss
thru May**



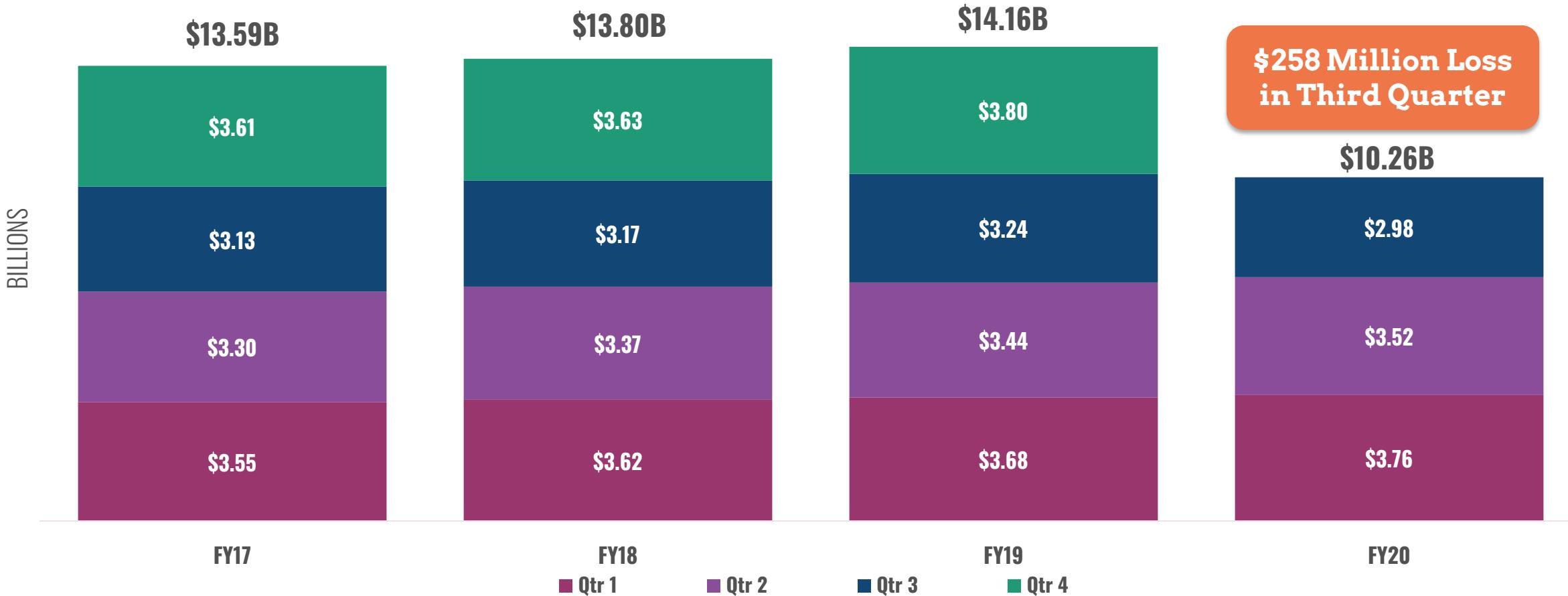
CYTD 2020

Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year.



FY Sales Revenue from Tourism-Related NAICS



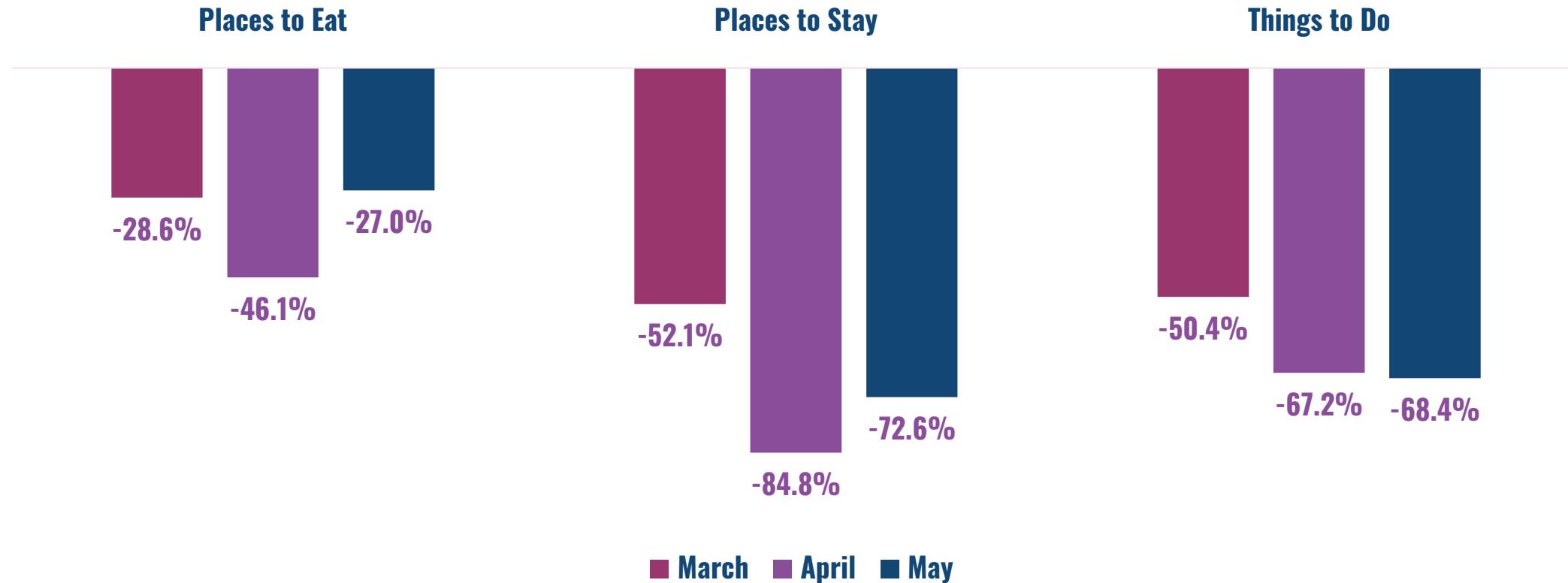
Missouri Travel Barometer

Daily drive trips of US travelers who moved at least 50 miles from their home and spent a minimum of 2 hours in Missouri.



NAICS Tourism Business Sales

Change in March - May 2020 Compared to March - May 2019

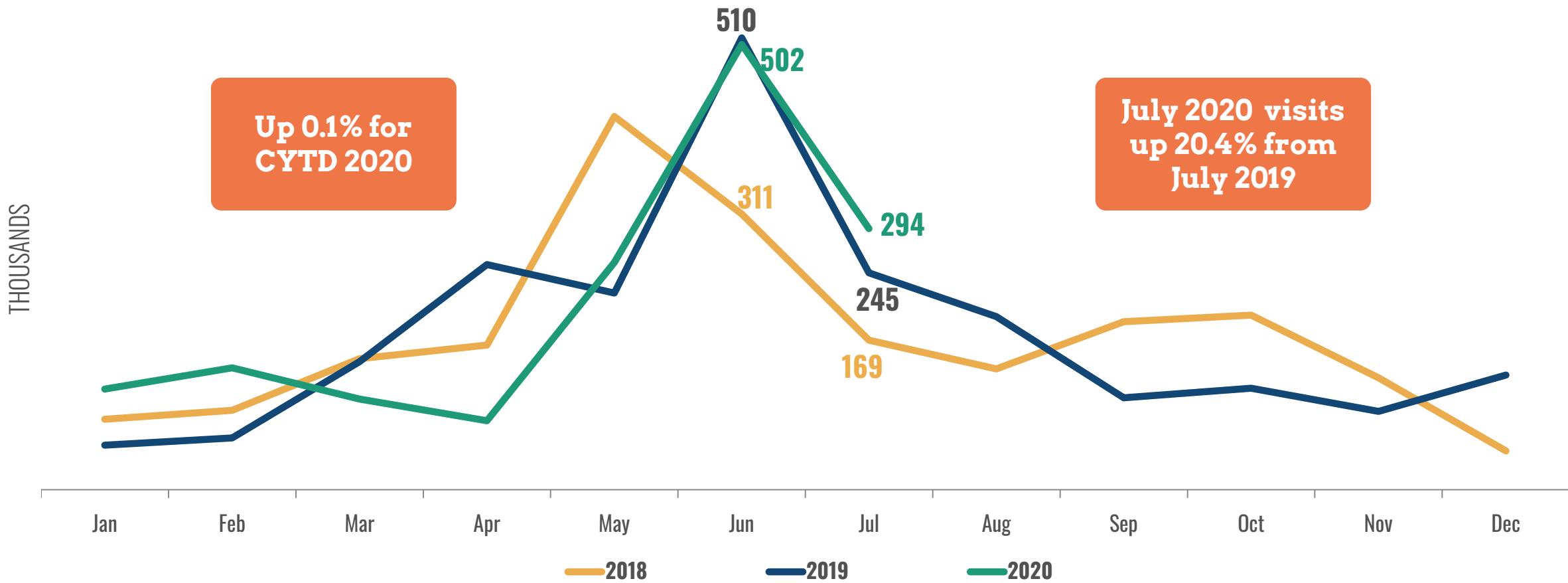


Missouri Travel Barometer

No significant marketing to drive website traffic or to solicit responses in the early part of 2020.



Visits to VisitMO.com by Month



May 2018 was the first full month of the new VisitMO website. Covid-19 began early 2020.

Visits to the MDT website and marketing responses will always fluctuate due to seasonal travel patterns.

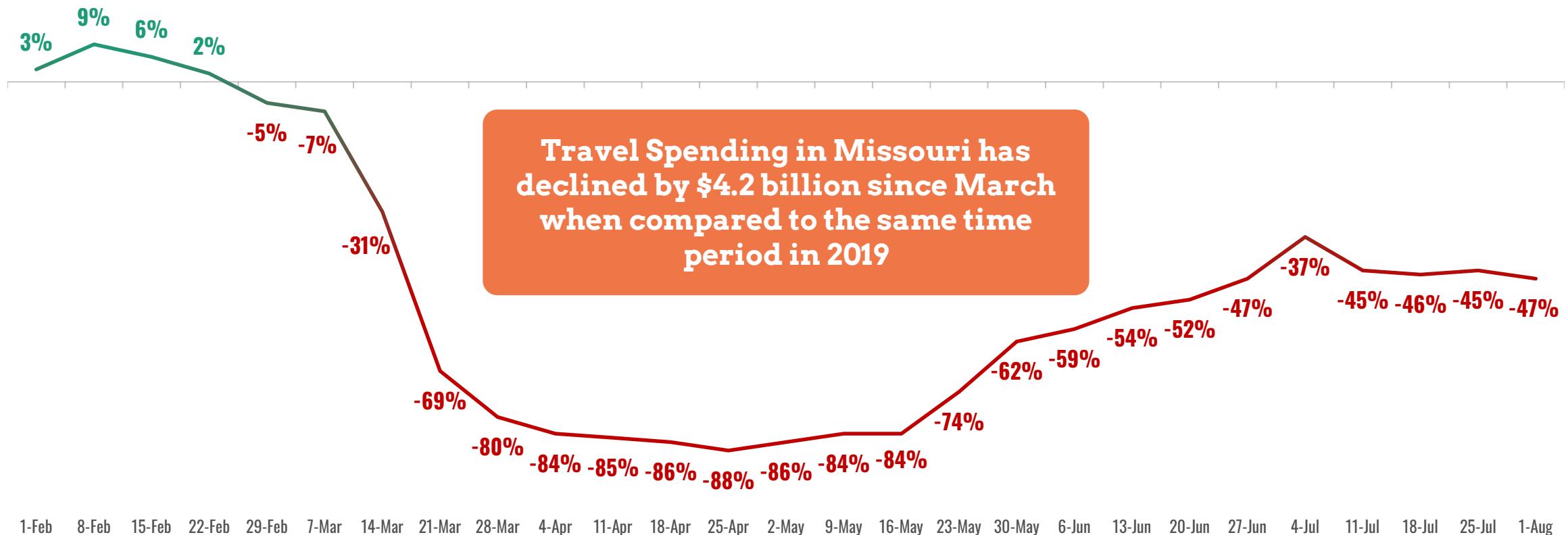
Missouri Travel Barometer



No significant marketing to drive website traffic or to solicit responses in the early part of 2020.

Economic Impact

Year-Over-Year % Change in Weekly Travel Spending in Missouri



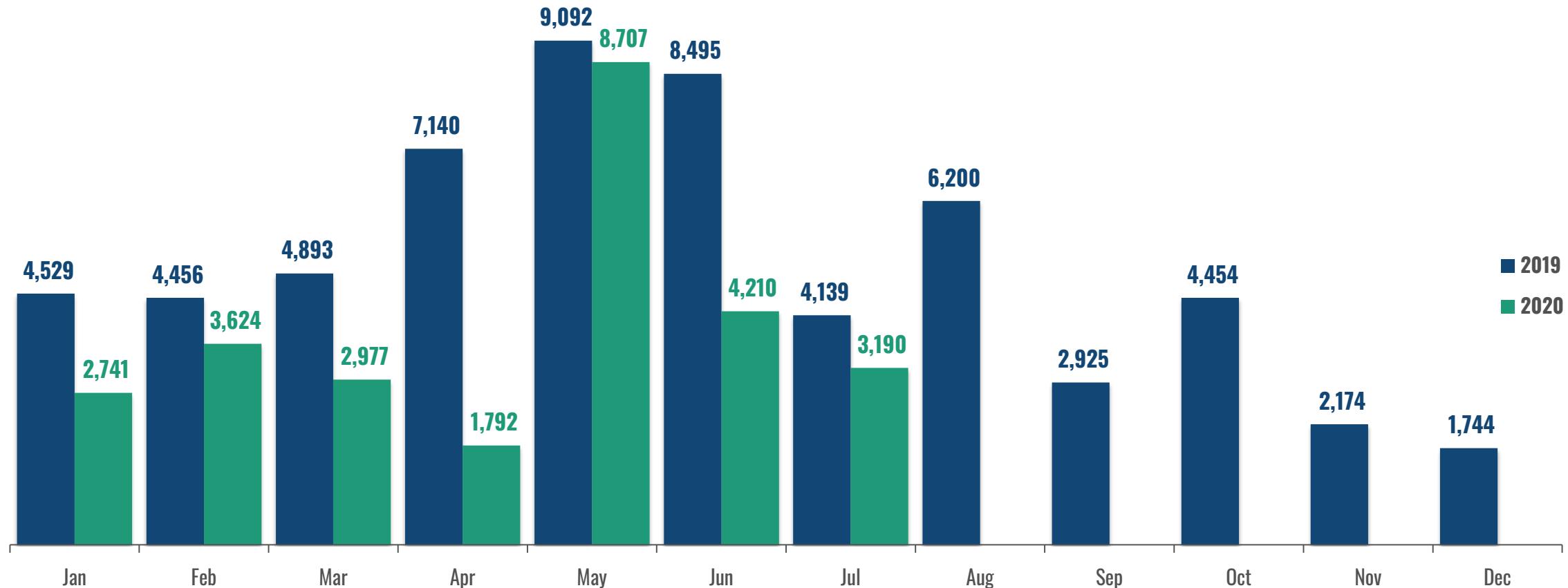
Travel Spending in Missouri has declined by \$4.2 billion since March when compared to the same time period in 2019

Missouri Travel Barometer



No significant marketing to drive website traffic or to solicit travel guide orders in the early part of 2020.

Fulfillment of Travel Guide Orders from All Sources



Visits to the MDT website and marketing responses will always fluctuate due to seasonal travel patterns. Travel guide orders come through website orders, RSL leads and telephone calls.

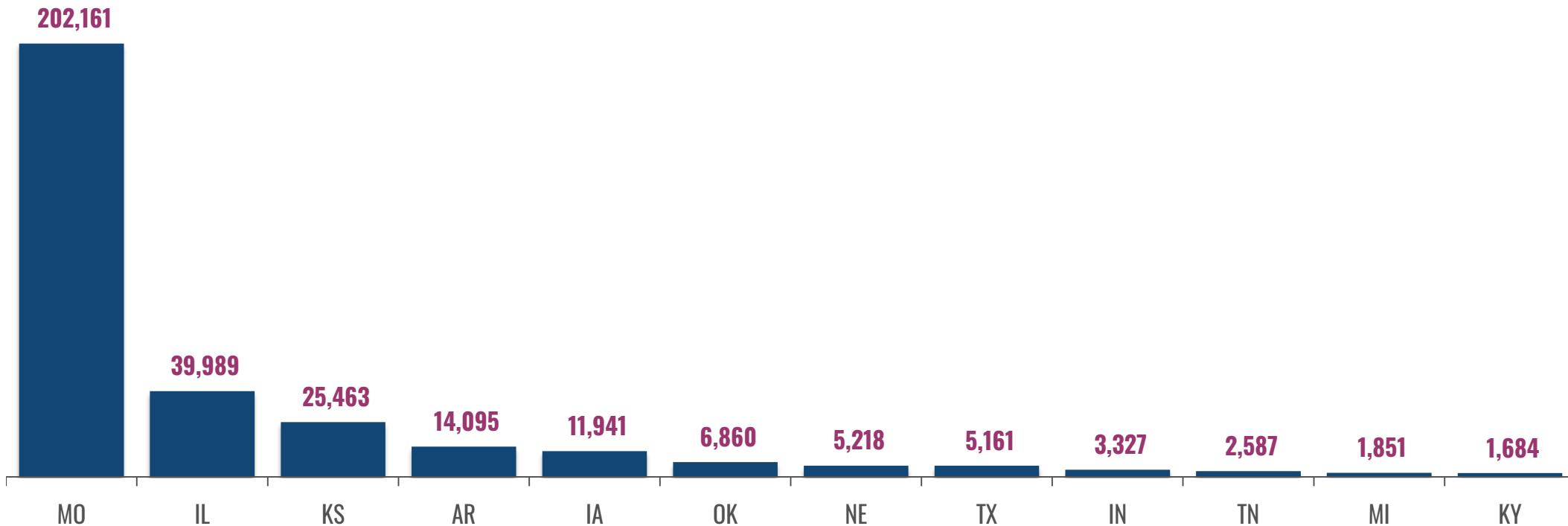
Missouri Travel Barometer

Daily drive trips of US travelers who moved at least 50 miles from their home and spent a minimum of 2 hours in Missouri.



Road Trips to Missouri Reported by Arrivalist

**Top States for Road Trips to MO
February - July**



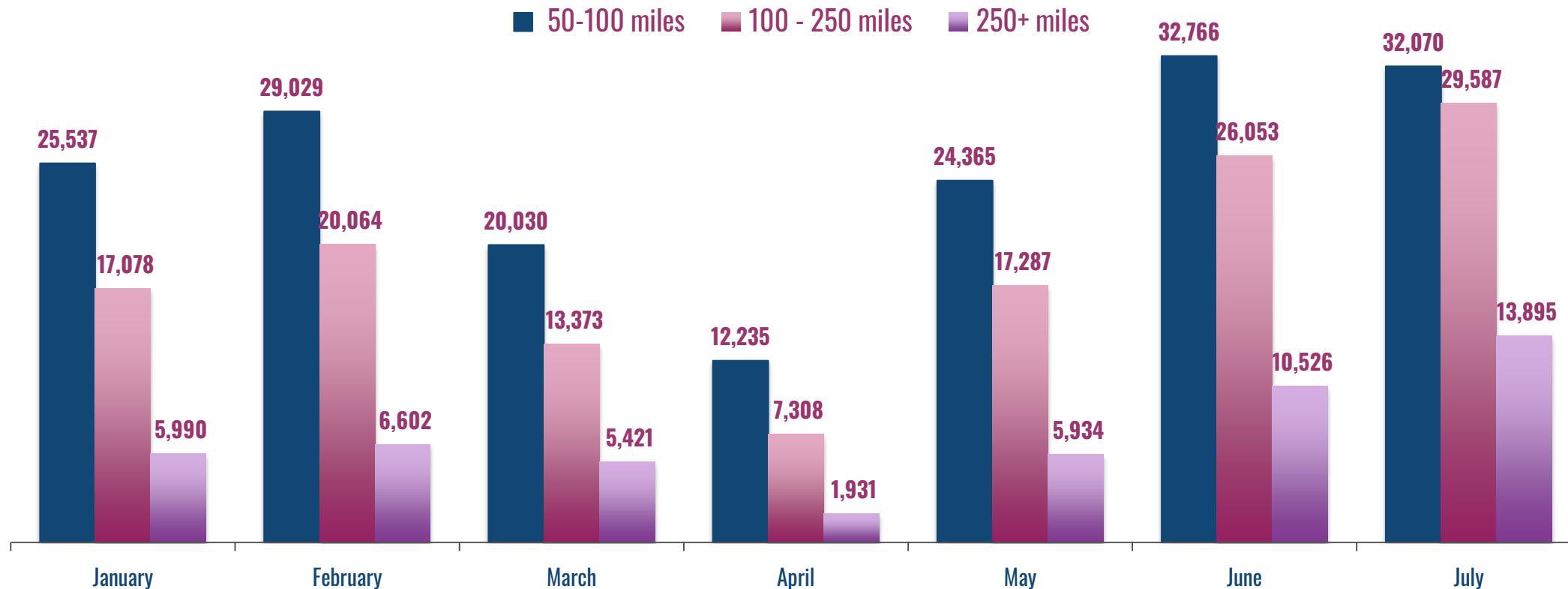
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Road Trips to Missouri by Reported by Arrivalist

Road Trips by All States to MO by Month & Distance Driven

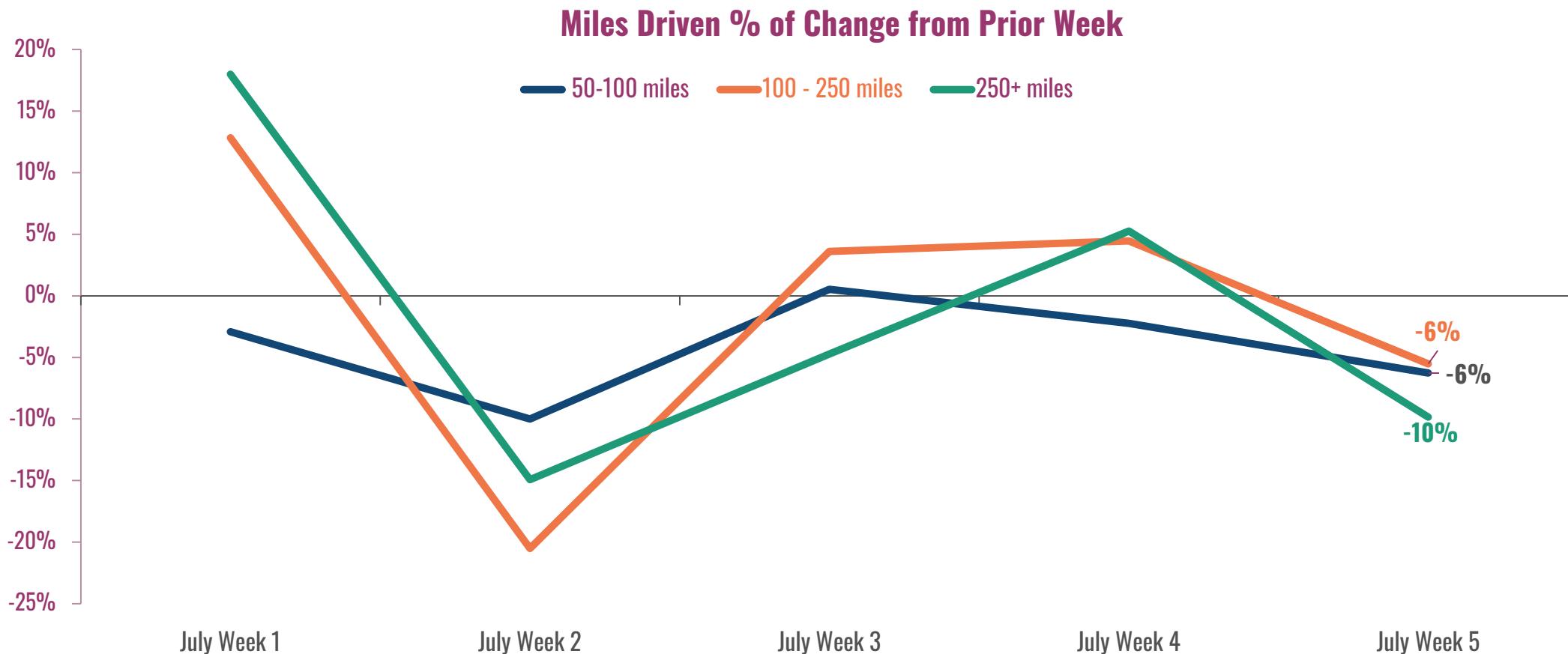


Missouri Travel Barometer

Daily drive trips of US travelers who moved at least 50 miles from their home and spent a minimum of 2 hours in Missouri.



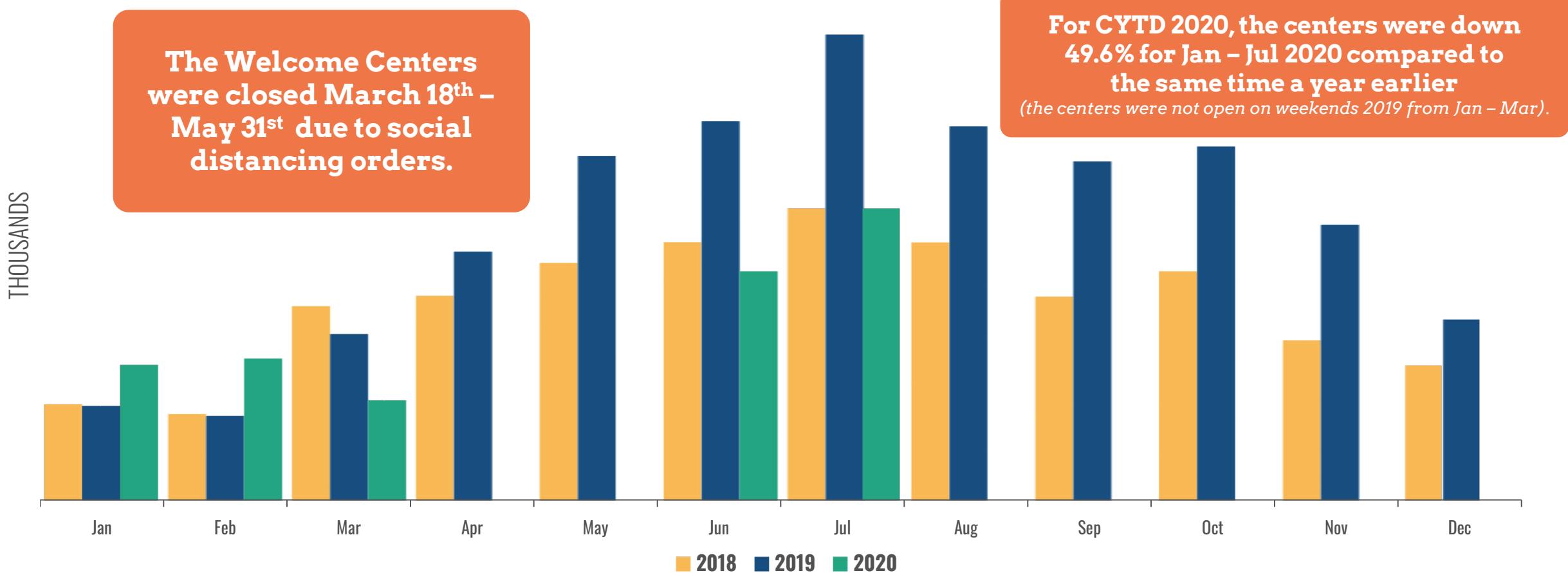
Road Trips to Missouri by Reported by Arrivalist



Missouri Travel Barometer



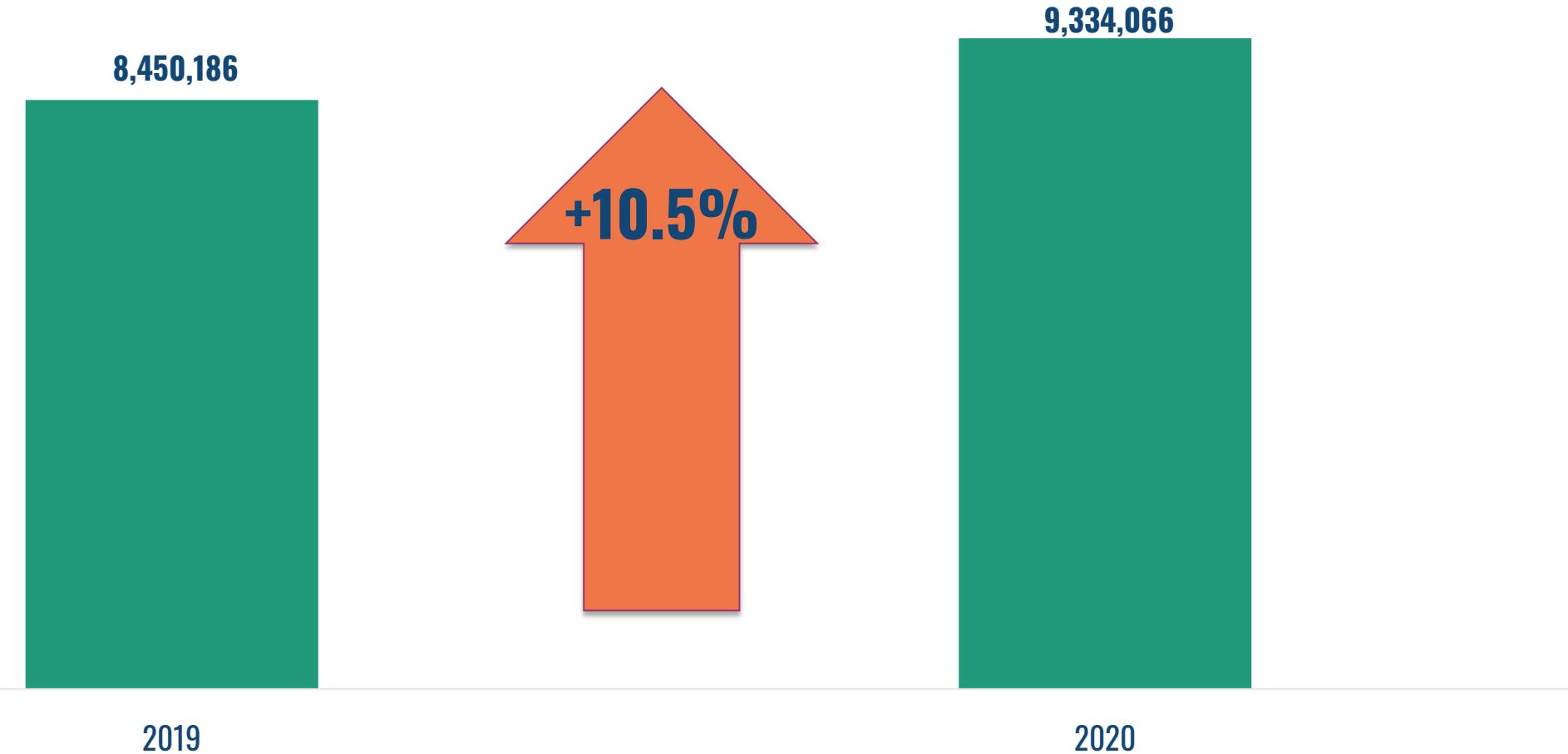
Welcome Center Visits: 2020 Calendar Year to Date through July



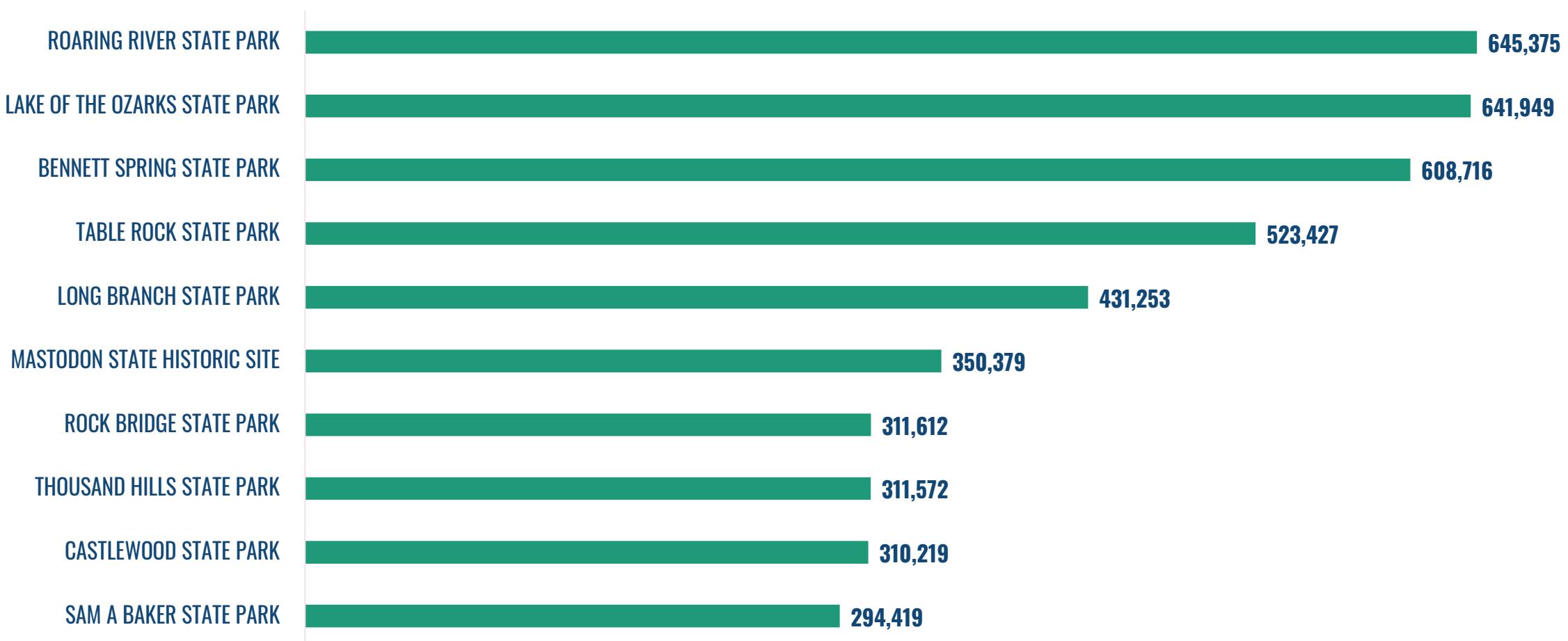
Missouri Travel Barometer



Visitors to Missouri State Parks during January - June



Most Visited Missouri State Parks during January - June



A photograph of a wooden bridge with a metal truss overhead. A bicycle is leaning against the right railing. The sun is low on the left, creating a bright lens flare.

THANK YOU

